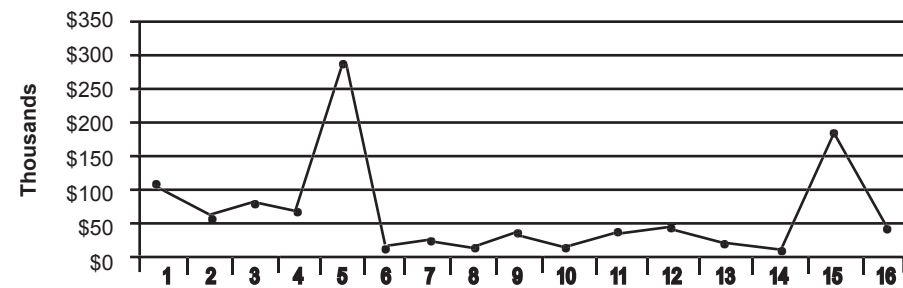**Small Agency Client Services
Monthly Tech. Pool Expenditures**

Here are the nuts and bolts of our approach:

1. Research to prepare for the first site visit

We do our homework. We answer two questions – who are you and what do you do? The goal is to go into the first site visit knowing as much about the customer as we can. We get up to speed on the agency's mission and business, contacts, organizational structure, size and, whether or not the agency has online applications that serve its clients.

2. Make the site visit count

Effective IT portfolio oversight begins with a comprehensive evaluation of the agency's technology infrastructure. We have adopted a *best practice* approach complimented with industry-standard evaluation tools and technologies.

Beginning with the first site visit, we work hard to build trust in the SACS program. We take a consultative stance. We find out how things are going and address any problems they might have contacted us about earlier. We ask if they have any technology projects underway and what challenges these projects are generating. We determine how technology is helping their business.

3. Build the right solution

We partner with our small agency customers to develop high-impact, low-cost IT solutions. We bring them into a long-term vision and strategic plan for technology investment. We open up training resources for project management. We coach and we advocate as small agencies negotiate the central service agencies for equipment and services. We build confidence in their ability to develop and maintain their own IT portfolio.

Key strategy – SACS is the front door to the Dept. of Information Services, guiding our customers toward the computing and telecommunications technology they need. And, as a best practice, we keep a log that documents small agency activities and often prompts us to identify an opportunity for partnership, co-location or procurement.

Increase small agency ISB compliance under SACS

By June 30 of this year, 99 percent of our small agency customers reached full compliance with ISB policy. This achievement marks the success of a process that raised the profile of small agencies and set them on a path toward compliance and accountability. At its core, we simplify the complexity of technology and its relationship to ISB policy. Ninety-nine percent compliance means that small agencies understand how IT supports their business.

Today, our small agency customers connect their IT portfolios to results – both operational and to the delivery of public service. They are learning how to minimize costs and gain the fullest possible advantage of their technology investments.

We are excited about a new handbook, designed in a question-and-answer format, which really drives home the value of an IT portfolio. We developed this tool to guide and support small agencies as they generate strategic plans and build budgets for their IT investments. The handbook walks a small agency – the Donut Commission – step-by-step through the process of developing and maintaining an effective portfolio; examples and functional templates turn the handbook into a real-world tool.

Strategic Priorities, July 1, 2005 to June 30, 2006

Our triage approach, which unfolds key central services to the small agency customer, now qualifies as a core enterprise program. Small agencies depend on us – the Dept. of Information Services, the Office of Financial Management and General Administration – to connect them with the technology, the financial services and the facility strategies they need to reach their own program goals.

In 2006, we will continue to build out the small agency program by sustaining these core elements of our work:

- Assessments of the technology, telecommunications and facility needs of small agencies;
- Acquisition of critical IT infrastructure and equipment; and
- Resource sharing through co-location and/or migration to DIS centralized e-mail and server hosting services.

I get around 100 customer calls every month. And, each one is an opportunity to test and evolve the SACS business model and connect small agencies to DIS services. Our small agencies depend on this kind of consultative dialogue and solution building.

— Linda Jo Demery, Small Agency Client Services Program Manager

Small Agency Client Services

2005 Progress Report

Department of Information Services
Small Agency Client Services

Letter from Linda Jo Demery, SACS program manager

The Small Agency Client Services program at the Dept. of Information Services has proved to be a high-impact, replicable business model for the enterprise. And, we continue to build its success on trust, results and shared resources. We remove the obstacles to greater efficiency and set high-tech, resource-enabled operations into motion. We make it possible for small agency staff to place their focus where it belongs in a small agency – on the mission and the citizen.

We've come a long way since the inception of the Small Agency Client Initiative (SAI) in 2001.

Small agencies are now accountable for their IT budgets and facility management. The State Government Network is more secure because many small agencies perform security planning and comply with security policy. And, small agencies now optimize technology investment funds though enterprise solutions that take full advantage of our innovative IT infrastructure.

Our commitment to results – positive change – makes us accountable to every small agency customer. And, we believe that better government happens when we demonstrate public benefit in a transparent and measurable way. It is a path of continuous improvement that demands we innovate, we perform and we lead.

–– *Linda Jo Demery, Small Agency Client Services Manager*

The Goal

Small Agency Client Services will lead and manage a statewide program focused on small agencies, boards and commissions. We will develop sustainable business solutions built with IT infrastructure, policy and funding, and the optimal use of state facilities.

2005 Strategic Priorities
Implementation Report July 1 2004 to June 30 2005

Complete 25 small agency IT/facility projects by June, 30 2005

Thirty-four customized technology solutions, including co-location projects, are operational in the 23 small agencies listed below. We implemented these IT/facility projects with $450,000 from the Washington's supplemental budget – small agency technology pool. The pool levels the funding field for small agencies.

SACS co-locates small agencies with mid- and/or large-agency partners to deliver substantial impacts for small funding commitments. Co-location partners share physical space, operational resources, network connection and IT infrastructure. This allows small agency staff to focus on programs and recipients, not operations and equipment.

As we implemented these projects, we met the deliverables called out in the 2003-05 Biennium Budget.

SACS improved the security – IT and/or physical – security for seven small agencies
- Transportation Improvement Board
- Washington State Department of Veteran's Affairs
- Human Rights Commission
- Department of Printing
- Transportation Improvement Board
- Arts Commission
- Public Disclosure Commission

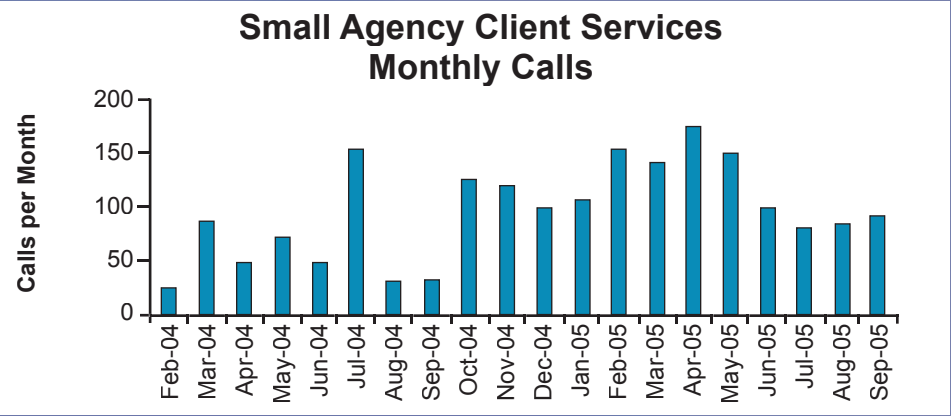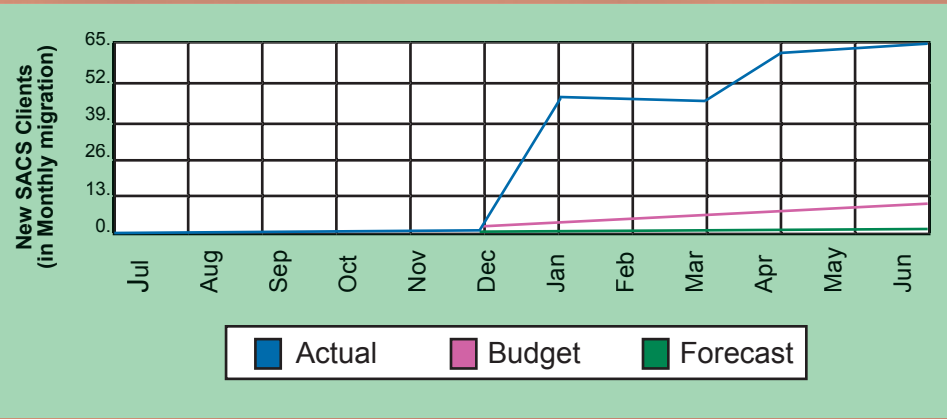**SACS connected six small agencies to the State Government Network**
- Caseload Forecast Council
- Home Care Quality Authority
- Board of Volunteer Firefighters
- Personnel Appeals Board
- Office of Civil Legal Aid
- Board of Tax Appeals

SACS helped four small agencies acquire critical IT infrastructure
- Office of the Lieutenant Governor
- Eastern Washington State Historical Society
- Country Road Administration Board
- Western Washington State Historical Society

On the horizon, we'll be working closely with the Deptartment of Personnel to make sure that Washington's small agencies are ready to join the HRMS system.

—*Linda Jo Demery*

Small Agency Client Services Monthly Calls

New SACS Clients (in Monthly migration)

Actual   Budget   Forecast

SACS led the co-location of six small agencies
- Washington Citizens' Commission on Salaries for Elected Officials
- Office of Administrative Hearings
- Washington State Commission on African-American Affairs
- Washington State Commission on Hispanic Affairs
- Washington Commission on Asian-Pacific American Affairs
- Governor's Office of Indian Affairs

Transition the IT portfolio oversight of small agencies to SACS by June, 30 2005

Since the July, 2004 report, SACS has assumed the oversight responsibilities for Washington's 120 small agencies, boards and commissions. Adding the oversight function has deepened the relationship we have with our customers and intensified the value of the small agency program to its clients and the state IT enterprise.

Education is key: we show small agencies how an IT portfolio can enhance their operation and add real value to their technology investment strategy.

We are having some transitioning issues... it's really nice to know that there is someone looking out for your interests, particularly when you are a small agency with no IT staff. I sincerely appreciate the terrific customer service and support.

—*Allyson Brooks, State Historic Preservation Officer*